



# CMS Manager Quick Guide

4/10/2006

In this guide learn how to:

- A. Logon to the application
- B. View, add, & delete competencies for a job position
- C. Review & Validate employee competencies
- D. Detailed Validation Option
- E. Provide recommendations for changes to the competency dictionary
- F. Find other experts, job positions, or projects

For more information:

- To see a list of competencies and guidelines for evaluating levels of proficiency , download the Competency Dictionary
- See the CMS website for frequently asked questions and more reference material.

Navigational Notes:

- The CMS application divides business responsibilities into various user roles. If assigned, you can change your role in the system from the “Home” Page/Tab.
- NOTE: For this user’s guide and functionality, make sure that you are in the “Manager” role.
- The CMS application groups sets of functions under a series of TABS. To access that set of functions, you must first click on the TAB at the top of the screen.
- When a TAB is selected, the application will then display a set of applicable commands.
- CAUTION! Use the TABS and commands to navigate through the application, not the BACK, FORWARD, or REFRESH buttons in your browser
- CAUTION! The application will automatically log you out after 20 minutes of inactivity. The application is not aware of keystrokes or actions you take in your browser, until you activate a command or select a link. So when viewing data on the screen, or while entering any text, keep in mind the time limit and occasional activate an application command.

## LOGON



- Enter the CMS URL: <https://cmstool.nasa.gov> into your browser.
- From the CMS Homepage, select “Logon to CMS”.
- From the User Logon screen, select your Center from the Center drop down menu.
- Enter your WebTADS User Name and Password in the UserID and Password fields and then click the Logon to CMS button.



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## MODIFY POSITION COMPETENCIES

1. Filter Position List

2. Select Position

3. Delete Competency

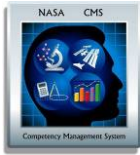
4. Adjust Tier Level

5. Assign Primary

6. Add Competency

7. Group Edit

- Filter Position List:** Select one of the organization codes from the drop down box, and then click the “Change Position List” button. . (NOTE: These organizations were assigned to you automatically because you are in a supervisory position or because of an administrative action in the system. To have your assigned organizations changed, please contact the CMS Operational Manager at your Center.)
- To select a position:** Select a position from the drop-down box. The application will automatically display the position competency information in the screen area below the TAB menu.
- To Delete a Competency:** Check the “Remove Box” next to the desired competency, then click the “Delete” button.
- Adjust Tier Level:** Using the set of tier guidelines found in the dictionary, enter the appropriate Tier Level (1-4) required for each competency for the position being reviewed, then click on “Adjust Tier Levels” button.
- Assign Primary:** For every job position, one of the required competencies should be designated as “primary”. It should be the one that best describes, or represents, the knowledge that is utilized the most over a given fiscal year. All competencies identified for a job position are considered of equal value. The primary competency is used during the workforce planning process to help simplify forecasting and the data analysis. To assign a competency as primary for the job position, select the radio option next to the competency, then click the “Assign Primary Comp” button.
- To Add a Competency:**
  - Enter competency number (found in the dictionary) and click the “Add Competency” button **or**
  - Select link to view dictionary, select all appropriate competencies, and then click the “Add Competencies” button.
- Group Edit:** This command allows you to view, compare, and adjust competencies across multiple job positions.

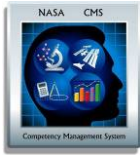


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## REVIEW & VALIDATE EMPLOYEE COMPETENCIES

- (1) **Change Employee List:** You can change the list of employees in the drop-down box by selecting a different organization, and/or by entering 1 to 4 characters of the employee's last name, then click the "Change" button.
- (2) **Select an employee:** Select an employee from the drop-down box. The application will automatically display the employee competency information in the screen area below the TAB menu.
- (3) **Set Requirements:** You can select the competencies required for the job position by checking the box under the "Rqd" column. You can also assign a competency as primary by selecting one of the options under the "Pri" column. After making your adjustments, click the "Set Rqmts" button..
- (4) **Adjust Tier Level:** You can set the expected tier level for each competency required for the job position of the employee. Enter (1-4) in the textbox under the Position Level, then click on "Set Levels" button.
- (5) **Quick Validation:** Submit your assessment of the employee's level of proficiency for each competency.
  - a. Verify that the employee has finished reviewing their portfolio and completed their self assessments. (NOTE: If the employee is not finished, then the system will indicate this with a highlighted yellow message.)
  - b. For each competency, compare the employee self-rated tier level against the set of guidelines for the tier indicators found in the dictionary. (NOTE: Tier 0 indicates that the employee has not entered a rating.)
  - c. If you agree with the employee's self rating, then enter the tier value in the textbox under the "New Validation" column. If you disagree, then enter your assessed tier level. (NOTE: You can enter your assessment of the employee's proficiency level for any competency, but the action only requires validation at Tiers 3 & 4, and assessment for Tier 0. The required supervisor validation will be highlighted on the screen.)
  - d. One you have entered the tier values; click the "Validate" button.
- (6) **Detailed Validation & Competency Info:** Click on the competency link to see more information (such as the definition, transaction history, and employee experience using this competency) . You can also perform a detailed validation of the employee's proficiency level. (See Next Section)
- (7) **Employee has competency?:** The competencies required for the job position is matched and displayed next to the competencies selected by the employee. The column indicates when a competency is required for the job, but has not been selected by the employee (as indicated by the "no" in the screen example above).



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## DETAILED VALIDATION OPTION

Competency Definition

[1] Information submitted by the employee that describes how they have applied this competency.

[2] You are validating the employee's self assessment of their proficiency level in this competency.

[3] Your rating of their proficiency level.

[4] You can submit rationale for your rating or suggestions for future employee development activities.

[5] You can select which areas you believe the employee needs further development to obtain their self-rating.

[6] When you have finished, click the button to record your validation

All validations & remarks are recorded.

Jetson, Jane HQ10348 : INTELLIGENCE OPERATIONS SPECIALIST

SECOUNTER : Counterintelligence/Counterterrorism Analysis, Investigation and Liaison (1073)

Knowledge, capabilities and practices associated with receipt, analysis, dissemination and investigation of information for the purpose of detecting, deterring and neutralizing acts involving espionage, intelligence activities, sabotage and/or terrorist activities conducted for or on behalf of foreign powers, organizations or persons.

Competency Evidences (Jane last updated this information on May 25 2005 11:52AM)

GS 132 Intelligence Analyst from 02-86 to 07-01 at US Secret Service.

Employee Expertise Level

Employee Self-Rating **3**  
Last Validated Rating none

New Validation

Instructions:

1. Review any notes/evidences (shown in the section above) submitted by the employee, which should show examples of how they have applied this competency at their self-rated level of expertise.
2. Discuss with the employee their past experiences using this competency and their rationale for rating themselves at Tier Level 3.
3. Evaluate the employee's depth of knowledge for this competency against the Tier Level 3 guidelines.
4. Submit your evaluation below.

**Tier Level 3:** Through the experience of applying their knowledge on the job, or other related work environment, the employee has developed a thorough understanding of the subject matter AND is highly proficient in being able to work in a complex work environment.

Note: The system will automatically default to the employee's rating, where you can make your adjustment.

Evaluation of Employee Expertise

Your rating of the employee's level of expertise: Level 3: Proficient

Rationale / General Comments (optional)

Note: You can record observations or additional information which helped with your evaluation. You can also use these remarks to capture details about the knowledge areas where the employee could improve their expertise. These notes can then be referenced during the Individual Development Planning process to help you and the employee identify specific actions.

Employee Development Opportunity (optional)

Identify the areas below where the employee needs more experience and/or training to improve their expertise to achieve Level 3: Proficient.

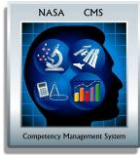
- ☐ **Use of Tools & Best Practices** Demonstrates skilled proficiency in their use of competency-related tools and best practices in their work environment.
- ☐ **Knowledge & Application of Policy, Standards, & Docs** Demonstrates skilled proficiency in their ability to incorporate their knowledge of competency-related policies, standards and other documentation to impact and modify systems and process in their work environment.
- ☐ **Information Collection & Analysis** Demonstrates skilled proficiency in their ability to compile and summarize data, produce technical outputs and provide complex analysis for their work environment.
- ☐ **Problem Identification & Resolution** Demonstrates skilled proficiency in their ability to develop or change procedures/processes to resolve and/or prevent difficult technical/business issues.
- ☐ **Professional Development & Communication** Demonstrates skilled proficiency in their ability to generate and present technical or functional documents and briefings to a variety of technical, functional, and/or management audiences.
- ☐ **Process/System Application, Assessment, & Integration** Demonstrates skilled proficiency in their ability to apply their knowledge to assess and integrate across organizational, functional, or competency boundaries when developing or modifying business processes and/or technical systems.

Submit Validation

Competency History

| Date/Time          | Action performed by | Change made to competency  |
|--------------------|---------------------|--|
| May 25 2005 1:49PM | Jane Jetson         | The employee changed their SELF-RATED tier level.Changed tier level from=0 to=3  |
| May 25 2005 1:49PM | Jane Jetson         | Competency was added to the employees portfolio  |
| May 25 2005 1:45PM | Jane Jetson         | The tier level of the competency required for the job position was changed PDN:HQ10348 INTELLIGENCE OPERATIONS SPECIALIST changed tier level from=3 to=0 |

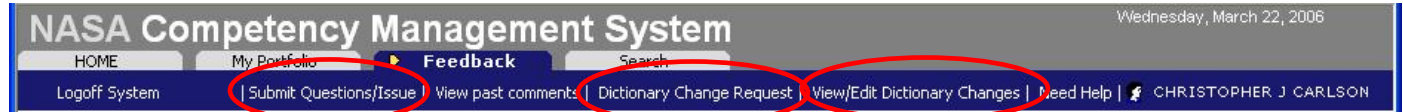




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## SUGGESTIONS AND DICTIONARY CHANGES

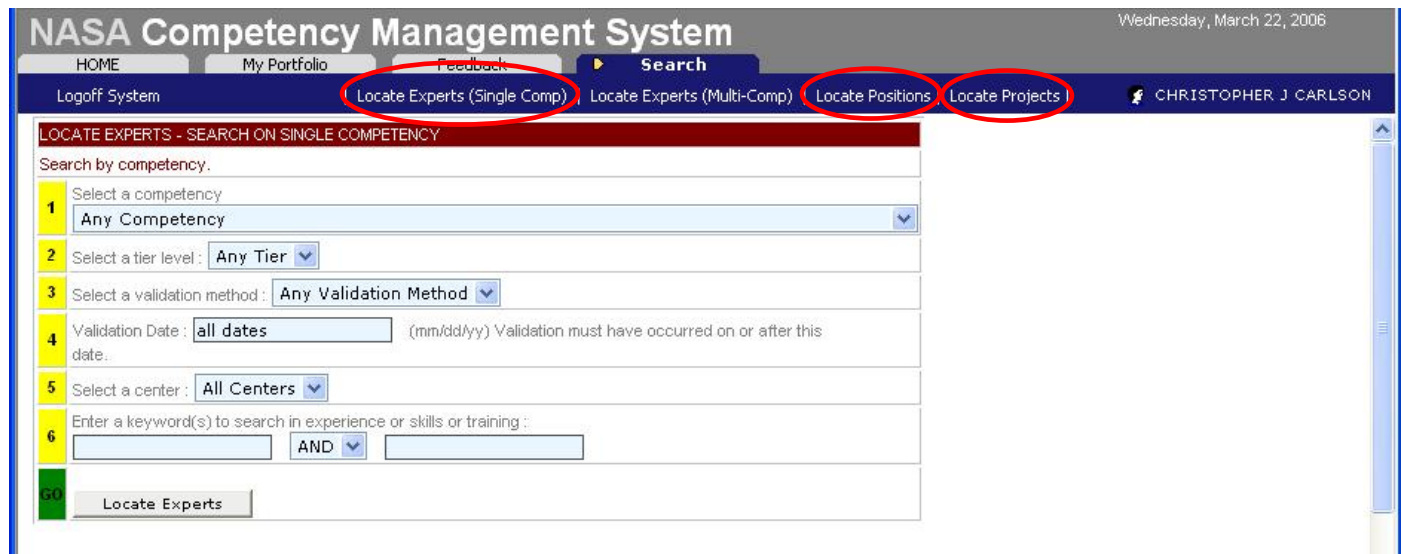


**Suggestions:** If you have trouble with the application or the business processes, or if you have any suggestions for improvements or any lessons learned on applying or utilizing the competency information, you can submit your comments on-line. The CMS Operational Manager at your center will review and disposition your comments. You can view the disposition status of your comments at anytime.

**Recommend a change to the Dictionary:** You can submit recommendations to add, remove, or clarify any competency in the dictionary. These suggestions will be reviewed and dispositioned by the appropriate professional community in conjunction with the responsible Agency/Center competency stakeholders. Approved changes will be incorporated into the periodic revision of the dictionary.

**Review proposed changes to the dictionary:** You can view any proposed dictionary changes and submit comments.

## FIND EXPERTS, POSITION, PROJECTS



**Locate Experts:** You can specify the competencies, tier level, Center, applied experience, and/or training and the system will identify the individuals that match your search criteria.

**Locate Job Positions:** You can find all of the job positions in the agency that utilize the competencies that you specify.

**Locate Programs/Projects:** You can view a listing of all projects that plan to utilize the competencies that you have specified.